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Date: .....

Dear.....

**Portfolio Transfer Authority**

I/We authorise you to supply Thesis Asset Management plc with full details of all the investments, including cash balances, that you currently manage or hold on my/our behalf and forward directly to them all related documentation upon their request.

I/We instruct you to accept this letter as authority to transfer my/our investments upon the request of Thesis Asset Management plc.

Thesis acts in accordance with the six expected outcomes of the Financial Services Authority's Treating Customers Fairly (TCF) initiative. Specifically, Thesis complies with TCF Outcome 6:

***Consumers do not face unreasonable post-sale barriers imposed by firms to change product, switch provider, submit a claim or make a complaint.***

Thesis consistently ensures that portfolios are transferred out within seven business days of receipt of re-registration details. Thesis expects firms with which it deals to meet the same standards of service. With this in mind, please take all possible steps to complete the transfer of my/our portfolio to Thesis within 7 business days of receipt of re-registration details.

Thesis also adheres to the APCIMS Good Practice Guide which is partly summarised below:

Where an outstanding debt is delaying the transfer of client's assets, the delivering firm will notify the receiving firm of the reason for the delay.

Delivering firms will normally provide valuations and transaction histories promptly when requested.

Both firms should ensure best efforts are used to obtain for clients those benefits to which they are entitled.

Please notify the named contact at Thesis if you believe that there is any reason why you will not be able to achieve these timescales.

The details associated with my/our portfolio are set out below

**Portfolio Transfer Authority – Portfolio details:**

Client Name(s):	
Address:	
Postcode:	
Existing Account Manager:	
Existing Account Number:	
<b>Contact at Thesis</b>	
Name:	Lynette Scott
Phone Number:	01243 531234
Email Address:	Lynette.Scott@thesis-plc.com

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Signature:

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Signature:

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Date:

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Date: